



Government  
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# THE LEARNING ORGANIZATION IN ACTION EXEMPLARY PRACTICES

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## 1. LEARNING IN A FUNCTIONAL COMMUNITY: TRANSPORT CANADA'S "COMMUNITY OF EXPERTS"

### The Learning Challenge

When Canadians travel by land, air or water, they want concrete assurances that they will arrive at their destination safely. Preserving the safety of travel is the responsibility of Transport Canada's Regulatory & Inspection Community. It is their diligence and expertise that has secured Canada's proud record in the area. However, storm clouds are visible on the horizon. A large portion of the community's population is scheduled to retire within a few years. For example, 44 percent of community members within the Department's Security group are eligible to retire by 2003 (and almost 70 percent by 2008). Most of the community's members will be leaving soon.

This situation poses a daunting challenge for the preservation of the Department's "organisational memory." How can the knowledge, expertise and experiences of retirees be captured so that younger generations of public servant can maintain the Department's capabilities? Just as important, how can this knowledge be shared across a community that is so widely dispersed geographically across the country? There is clearly a need to find ways to improve the community's ability to learn, especially across great distances – doing so before time runs out.

### The Learning Trailblazers

A small project team has risen to the challenge. The team has launched a pilot project to gather the knowledge and expertise of several experienced regulatory and inspection officials – the Department's "community of experts." The tricky part involves identifying these experts, engaging in dialogue to find out what they know, figuring out what knowledge is important, and then finding ways to make that knowledge portable.

This agenda is tricky for several reasons. The experts needed to be somewhat representative of the functional community as a whole. Moreover, the project team had little experience in the area, so they were unable to simply interview people. Instead, they had to engage in a dialogue that encouraged people to think about their jobs from the teacher's point-of-view and then share key lessons with candour. All of this had to be done systematically, for a patchy and shallow body of knowledge provides an incomplete (and potentially misleading) picture.

This agenda could only be completed by enlisting the talents of horizontal partners. Officials within the Department's three areas of responsibility – air, marine and land transportation – were brought into the process to identify the experts. Private sector consultants were contracted to develop new ways of gathering and distributing knowledge. The Department's information technology personnel were also enlisted early in the process to find ways of building infrastructure around the preservation of knowledge.

## The Learning Techniques

As this case shows, a variety of techniques are required to act on LDC recommendations to preserve corporate memory through a community of experts and develop horizontal linkages in pursuit of learning. Innovative dialogue techniques were required to encourage practitioners to reflect on what they do, identify the most important lessons, and scrutinize the rigour of each contribution. Horizontal partners had to be recruited early on so as to ensure they understand the process and are committed to its success. Most importantly, partners needed to be able to share openly and without reservation. Advanced “knowledge management” tools had to be created to record the knowledge and make it accessible across the Public Service.

In summary, this agenda requires a skilful blending of organisational learning and knowledge management techniques. As one member of the project team puts it: “For too long have [knowledge management and organisational learning] been allowed to function as almost separate entities, yet there are clear common elements between them.”

## The Learning Journey

Once the agenda was set at the beginning of the fiscal year, the process began by getting private sector knowledge management consultants to lay the early groundwork. The team needed a framework with which to organise its efforts in an anticipatory way. This framework helped the project team develop a focus by the end of the summer. When it came to actually implementing some of the recommendations, however, a different team of contractors had to be recruited. It was felt that the actual gathering of experts knowledge had to be done by consultants with extensive first-hand experience and well developed tools. These people really had to know all aspects of the challenge: the conceptual issues, the people, the technology and the management practices.

As the learning techniques were being developed and refined, horizontal linkages needed to be developed within the Department. An initial group of experts included a master mariner, a wildlife biologist who studied the problem of birds hitting aircraft, and an expert in aviation maintenance and manufacturing. Initial dialogues and recording took place by Christmas. These early tests were crucial for designing a set of workshops with a larger sample of experts in the following months. The resulting knowledge was then gathered within a knowledge repository by the knowledge management consultants. By the end of the fiscal year, the first stage of the pilot project was complete.

A number of hurdles were faced during this opening round. The original project manager left for another position and he needed to mentor his successor within a short time frame. There were also challenges involved in keeping partners in remote regions informed during the process. Fortunately, these hurdles were overcome without disruption to the project.

## The Journey Continues

This is only one step in a larger journey that will take place over several years. An attempt to draw lessons learned is under way. Much remains to be done to make this knowledge more widely available and gather more knowledge, but on a larger scale.

## 2. LEARNING IN A TEAM ENVIRONMENT: INDUSTRY CANADA'S MANAGEMENT CONSULTING CENTRE

### The Learning Challenge

When a manager at Industry Canada needs advice on marketing, economic analysis, alternative service delivery, or other management consulting services, they can turn to Industry Canada's Management Consulting Centre (MCC). This team has first-hand understanding of public sector issues, and particularly those facing Industry Canada, an extensive network of contacts and the ability to handle sensitive internal issues. Despite these advantages and a great deal of success, the field of management consulting has recently undergone a massive transformation that has prompted the Centre to initiate some changes of its own.

Private sector consulting firms have grown extremely large during the 1990s as companies contract out more activities. In fact, because of the recent emphasis on fiscal austerity, the public sector has also come to rely heavily on external contractors. Size and global reach gives these companies many advantages not available to a small public shop, such as integration with high-tech companies and a large pool of experience. The MCC had to rethink the way it operates, finding new sources of value that give it a solid niche within the Department. This involves learning new skills and bodies of knowledge.

### The Learning Trailblazers

The team responded to these challenges by taking the LDC's list of learning recommendations and making it their guide book. In a sense, the team used the report as their learning "fitness regimen" – a set of practices that, when implemented, enhance old capabilities and generate innovative new ones. Not all LDC recommendations apply to such a small team. However, the Centre's experience shows how the implementation of sub-set of recommendations can transform the way a team operates.

### The Learning Techniques

The list of learning tools implemented has been remarkable given the time and resource constraints placed on team members. The cornerstone of the new approach involves several LDC recommendations. Individual and team learning plans are used to assess current gaps in knowledge and skills and then identify concrete steps for filling those gaps. Each member of the team is also responsible for documenting expertise within the system for a key knowledge area – a technique that preserves corporate memory while building new capabilities within the team. Finally, many teaching and learning techniques are used to fill in the remaining gaps in knowledge. This includes training and two-way mentorship, as team members tutor their colleagues to transfer skills and knowledge. It is on this foundation that several other learning techniques have been implemented, such as brown-bag information sharing sessions.

## The Learning Journey

Over the course of the last year, the Centre has achieved a great deal of progress in transforming the way it learns. An early step involved bringing in an outsider to conduct an evaluation of the team's learning practices and service quality. It was an extremely busy time of the year to conduct such an assessment, but team members wanted to make learning and excellence a priority. As with most evaluations, the results were mixed. In response to those areas considered to be weaknesses, the team conducted a facilitated dialogue session to prioritize challenges and make plans to improve. This formed the basis for the team's learning plan.

The process of creating learning plans hinged on the competency profiles for consultants. Half-way through the year it was found that 70 percent of the plans were implemented – an early lead that was expected, since the second half of the year tends to be busier. The plans outline clearly the learning activities that need to be implemented (such as training courses). However, the team wants to improve by incorporating more knowledge gathering activities into the learning plans, thus bridging both individual and team learning plans. The Departmental sector is also taking steps to ensure greater consistency in learning plans across individuals.

The process of gathering knowledge within the system started out as a mandated exercise but consultants soon found themselves volunteering to explore new issues above and beyond the call of duty. Team members began requesting special information sharing sessions. Members also developed small working groups to cultivate knowledge within a particular area and share insights. New protocols were developed to better organize the knowledge on the Centre's computer system. All of this has enhanced the Centre's expertise, giving it that all important edge in a highly competitive field.

## The Journey Continues

Although many steps have already been taken, the process of transformation has only just begun. The team is about to engage in a stock-taking exercise to assess the state of their knowledge gathering activities. The intention is to develop more effective ways of gathering knowledge and information that the team needs. The team is also looking at CCMD's new learning guide for individuals and teams – *The Learning Journey* – to help bring its learning abilities up to the next level.



### 3. LEARNING ON A DEPARTMENT-WIDE BASIS: AGRICULTURE & AGRI-FOOD CANADA'S LEARNING JOURNEY

#### The Learning Challenge

Serving Canadians' agricultural needs and the nation's agricultural industry has become an even greater challenge within the new global economy. Agricultural goods are commodities traded around the world and, thanks to new information technologies, this occurs instantaneously. Many foreign governments heavily subsidize their industries, placing a great deal of pressure on domestic producers to be even more efficient than global markets would otherwise require. Canadian producers expect high standards of living and Canadians in general demand high quality products. The key challenge is finding new sources of value that Canada's agricultural industry can leverage to thrive in this new environment.

Part of the solution involves helping Canadian industry develop new capabilities. However, before this can be done, public service providers must also rethink the way they serve Canadians. The Department of Agriculture & Agri-food Canada had to learn more effective ways of serving the public while, at the same time, developing new policies to enhance the agriculture industry. The Department formed a task team to meet this challenge. The task team's report identified two major steps. The first step was to focus on responsibility to citizens and the second to establish that responsibility as a common purpose for all employees. It became clear that this would require organization-wide transformation in terms of how people work together. The art of team work needed to be reinvented. This begs the question: how can an entire department transform the way it works together? This is such a major learning challenge because of the complexity of the issues the Department faces – involving new advances in bio-technology, new trends in economics, and innovative models of public service delivery – and the sheer size of the organization.

#### The Learning Trailblazers

The key to success is two fold. On the one hand, senior officials within the Department needed to recognize the urgency for learning and chart a new direction with learning in mind. On the other hand, there are limits to what senior officials can do, for learning needs to exist throughout the organization as the cumulative effect of individual commitment.

The Deputy Minister recognized this early as he consulted with the LDC on learning innovations and led his own research project on the topic with the help of CCMD's action research program. Early experiences demonstrated the value of a corporate strategy for learning. The Department is now undergoing a systematic, multi-year transformation in the way it learns – building new learning and leadership competencies at every level and within every functional community.



## The Learning Techniques

The list of techniques used within the Department is quite extensive. At the top, it involves new team-based approaches to developing recommendations to senior management. “Task teams” are work groups that function independent of branch management and without a chairperson. People from every region, level and functional community are brought together to provide the most inclusive range of expertise and perspectives and to leverage the power of creative conflict. Each team includes representation from every branch yet each member is expected to contribute as an individual and not as a branch representative. Everyone is placed on an equal footing to engage in dialogue and is encouraged to make a personal contribution to the discussion. The teams meet for a period of three weeks to three months depending on the scope of the issue at hand. The team is mandated to explore a specific topic but all terms of reference and processes are created by the team itself. The results can be a report or presentation and all have shown high levels of innovation and ingenuity. This is a fulfilment of the LDC’s recommendations to make learning a management priority, the promotion of team work and team diversity, and create an environment that challenges the status quo.

For individual public servants, the focus is on developing new competencies and plans that allow individuals to thrive within a less hierarchical, more collaborative, team environment. A program is being put in place to ensure that all employees acquire an understanding of these competencies within a three-year period. At the same time, new access to learning resources (such as training) is being extended. This is a prime example of the LDC’s call to train for innovation and experimentation.

## The Learning Journey

Task teams have become a common approach to problem-solving and developing strategies for two reasons. They provide powerful and innovative results for the organization. They are also opportunities for people to learn from and teach each other, building new expertise and a more comprehensive understanding of how their work and the work of their colleagues contribute to the common purpose. By year’s end, approximately 300 people have become involved in the teams.

The best example of task team effectiveness involved the Department setting up a new strategic direction. People from each branch, many from regions across the country, took part in a task team. Many members had never had the opportunity to share ideas with colleagues outside their own functional community and the team developed a more comprehensive understanding of what the Department does. Soon, new policy options related to high-tech agricultural products were being explored. The team developed a strategic plan to help agriculture producers develop high-value goods and services to escape the cut-throat competition of commodity markets. Without team-based collaboration, many of these innovative options would have never been discovered.

This new approach also provides a variety of individual development opportunities. Members learn how to work better in teams. The process takes some adjustment on the part of team members. The first week the team meets is usually difficult because members cannot delegate – their own ideas are considered valuable and everyone is expected to make a contribution. In addition, short timelines and the absence of hierarchical and traditional parameters require them to quickly create their own way to work as a team. As each individual is different, each group of individuals differs in what works best for them. Once members realize that they have greater freedom to frame and discuss ideas, their worldview changes and they begin to explore areas of commonality and shared purpose. Breaking down barriers within the Department has helped to push perspectives beyond it: when people are not compelled to represent a branch focus they are freer to be citizen-focussed. A survey of all task teams indicated that members see the value of people over hierarchical roles, as well as the importance of commitment to citizens rather than structure or tradition in producing better results. Respondants also said that the tight timelines and lack of management-imposed rules create a dynamic, flexible and results-oriented environment and a better understanding of the work of others which they have carried back to their on-going workplaces.

Progress is taking place to improve individual capabilities on other fronts as well. Week long learning sessions with periodic follow-up meetings are being piloted to develop innovation and collaboration through self-assessment and individual and group exercises. Tools from the session include personal learning plans and an inventory of development resources such as exercises, courses, videos, and structured training courses as well as less traditional approaches such as opportunities for short, medium and longer term learning assignments. Up to 500 employees at all levels and in all functional communities will take part in these sessions each year. At management levels, 360 degree feedback and development recommendations are being provided to assist managers in enabling their own teams. Opportunities are being provided at the individual contributor and management levels to ensure the development of both individual expertise and an environment in which individuals can achieve, share and contribute to the best of their abilities. Both are crucial to removing barriers and adding new opportunities for learning within the Department.

## **The Journey Continues**

Clearly, an entire department cannot be transformed over the course of a single year. Now that it has some early successes under its belt, the culture of the Department is beginning to change. The upcoming years will see further implementation of these learning techniques, as well as the development of a departmental policy framework.



#### 4. LEARNING IN A CENTRAL AGENCY: THE TREASURY BOARD SECRETARIAT'S PROGRAM SECTOR LEARNING & KNOWLEDGE MANAGEMENT AGENDA

### The Challenge

By their very nature, central agencies undertake many high-risk, mission-critical tasks that serve the Canadian Public Service as a whole. The Treasury Board Secretariat is a textbook example, responsible for a variety of tasks: from serving the Treasury Board and scrutinizing resource allocations, to conducting collective bargaining, stewarding the creation of the government's electronic infrastructure, and promoting innovative management practices. Given this variety of interrelated functions, and the size of the Public Service the agency serves, it is absolutely vital that the agency gathers knowledge effectively and puts it to good use.

The challenge was finding ways to make the most of the knowledge within the agency, the agency's people, the government as a whole and the agency's clients in particular. It is equally vital that people and learning remain a vital part of the equation, and not simply rely on technology, an area of expertise within the agency. This is also challenging given that the agency operates many divisions, each pursuing their own priorities. There was a need to build horizontal bridges for the sharing of knowledge.

### The Learning Trailblazers

Three of TBS's sectors, collectively referred to as the Program Sectors, took up this challenge by creating a Learning & Knowledge Management Unit. The Unit organizes and delivers an internal training program and various learning events and it has also developed a Knowledge Management Framework and a set of action plans for the advancement of organizational learning and knowledge management. It is also active in developing partnerships with other relevant groups and functions both within the agency and externally.

### The Learning Techniques

Mirroring the LDC's report, the Knowledge Management Framework attempts to picture the kind of work environment that promotes organizational learning and the effective management of both the workforce and the workplace in an integrated way. This involves a holistic management focus toward human resource practices, professional development, information management practices, leadership, supportive technology and staff training. It also identifies specific types of knowledge needed by the staff.

The Sectors' Learning and Knowledge Management Agenda has three primary goals.

The first goal is to meet the three sectors' basic training needs. One of the more interesting ways in which this is achieved is through "boot camps." These are not simply orientation sessions that provide new recruits with basic information about an organization. Instead, the boot camps bring new program analysts up-to-speed on the core functions and essential skills required within the Program Sectors thanks to the active contribution of seasoned veterans. The Unit also develops and delivers more in-depth training modules.

The second goal is to operationalize the core learning program; in other words, finding ways to promote organizational learning within the sector. This includes making training and learning opportunities more client driven, delivered in a way that is more convenient to users (e.g. through electronic means). This also includes improving professional development and learning events by staging them at more regular intervals, improving bilingual delivery, and linking them to other events and groups. The Unit has also provided some support to the formation of the department's portfolio teams.

The third goal is to help the three sectors make progress towards knowledge management. This has involved a systematic assessment of the cultural and environmental factors that affect knowledge sharing and learning within the sectors. As a result, a set of action plans has been prepared and this work will proceed in the coming year. Finally, the Unit provides advice on simple, practical ways to make organizational learning and knowledge management an effective management tool.

## **The Learning Journey**

Considerable progress has been made in making this vision a reality. The “boot camp” initiative was started in 1999 and continues to evolve. It is regarded as very successful and, in fact, other units are considering the replication of such focused and functional training activities. New training modules have been developed and improvements in training programs have been identified.

There has also been progress in integrating simple learning features into regular management practices. For example, when the sectors' managers get together for their regular meeting, they include a standing item on the agenda for sharing of lessons learned. This acts as a regular prompt for managers to share some interesting insight or experience with their colleagues.

The Unit is also actively involved externally with “communities of practice”, particularly the Interdepartmental Knowledge Management Forum (IKMF), in order to share key lessons about organizational learning and knowledge management. In general terms, a community of practice is a network of people who share a common interest, job, or set of challenges. The IKMF includes people from more than 25 federal departments and agencies and meets monthly on a face-to-face basis as well as having a virtual presence. This is proving to be an extremely valuable method for sharing information and experience as well as for motivating individuals to change the way they organize and share knowledge.

## **The Journey Continues**

There are many more steps that need to be taken to fully achieve the Program Sectors' Learning and Knowledge Management Agenda. There is work to improve the utilization of the information systems in support of knowledge sharing and learning, as well as to more effectively utilize the capabilities of the department's intranet. The summer will also witness a revision to a number of the learning tools and reference aids for the Program Sector staff as well as the development of the mechanisms for client driven, just-in-time training using electronic means.

## 5. MANAGEMENT DEVELOPMENT IN THE SCIENCE AND TECHNOLOGY (S&T) COMMUNITY

### The Challenge

In a chapter of his 1994 report, the Auditor General criticized the management of science and technology programs in the Federal Public Service. He found that we needed to do a better job of training and developing S&T managers if we hoped to meet future challenges. In response to this report, TBS organized a Senior Steering Committee for Human Resources in the S&T Community and supported joint work by the Community to respond to the general criticism and to each of several specific recommendations of the Auditor General.

The S&T Community has produced two reports recommending a competency-based approach to management development and identifying competencies which distinguish superior S&T managers. The reports were accepted by the Senior Steering Committee and by the COSO S&T Subcommittee, but did not lead to immediate action.

The challenge of the past eighteen months has been to turn the work of the Community into action. The response has been to work together to introduce self-directed learning of management competencies in the Community.

### The Players

The human resources work of the S&T Community is overseen by the Senior Steering Committee of ADMs of science-based departments and agencies and by the COSO S&T subcommittee. On the Senior Steering Committee, Dr. Marc-Denis Everell of EC is the champion of management development. Working level coordination is provided by an interdepartmental working group presently chaired by Gary Lewis of EC. CCMD invited Dr. Bill Doubleday to assume the role of Senior Visiting Fellow, Science and Technology in the fall of 1999 to focus on moving the issue forward.

### The Tools

Five tools have been instrumental in transforming the Community's studies into action. Competencies for S&T managers are compatible with the Public Service Commission's leadership competencies but recognize the need of S&T managers to have technical mastery as well. A framework for management development outlines the process of self-directed learning to acquire management competencies and defines roles and responsibilities at all levels of the Community. Introduction to Lifelong Learning is a half-day course to inform S&T managers and potential managers of the management competencies, the process of preparing a personal learning plan and the support they can expect from their departments. It also explains what they should be providing to their subordinates. CCMD's Learning Coach offers a WWW-based self-assessment questionnaire to help identify learning needs and guides individuals through the process of drafting a personal learning plan. A brochure on personal learning plans explains what they are, how to prepare them and how to overcome some of the emotional barriers that inhibit preparing the first plan. A communications initiative informs S&T management committees, regional science manager forums and groups of S&T managers of the development framework and tools.

## The Journey

Mainly through the efforts of an interdepartmental working group, the Community elaborated a competency-based approach to management development, as well as identified and tested a list of seven competencies for S&T managers. CCMD worked with this group to prepare a framework for self-directed learning in the Community and to develop tools to support self-directed learning. Bill Doubleday has communicated the framework and tools to management committees of science-based departments and agencies and to regional science manager forums. The Senior Steering Committee provided financial support and adopted the self-directed learning framework.

## The Journey Continues

Departments are now putting the preparatory work of the Community into practice. The S&T management competencies, the self-directed learning approach and the supporting tools are being communicated to S&T managers and candidate managers cross the country.

Work is underway to improve the Learning Coach by incorporating courses offered by science-based departments and agencies that are being made available to others from the Community and to allow S&T managers to access the Learning Coach using competencies.

The Community is developing a three-day course to strengthen the leadership skills of new S&T supervisors.

CCMD is setting up a part-time learning advisor position serving and supported by the S&T Community.



## 6. THE MANAGERS' NATIONAL PROFESSIONAL DEVELOPMENT FORUM

### The Challenge

On April 2-4, 2001, the first-ever Managers' National Professional Development Forum was held in Ottawa. Under the theme "The Power to Act: Learning, Leading, Mastering", this groundbreaking interdepartmental event built on the learning objective of addressing the professional development needs of individual managers to launch a national community of manager networks from every province and territory.

### The Journey

This spectacular learning journey began in June, 2000 when for the first time, representatives of emerging manager networks from across Canada met in Toronto under the stewardship of Mike Nurse, ADM Champion for Managers, to identify common needs and issues and to strike a national council to better support the community. Learning and the need to improve accessibility to learning was a recurring theme in all of the presentations made by the participants. In the course of the discussions, the idea was born to organize a national professional development forum in partnership with the Canadian Centre for Management Development and The Leadership Network. Such a forum would serve many purposes:

1. to forge a truly national community of managers;
2. to move the community as a whole from consultation about learning to action in support of common professional development needs and
3. to strengthen the working relationship among the community representatives from across Canada, the Canadian Centre for Management Development and The Leadership Network.

The Forum was also intended to act as a catalyst for increased accessibility to affordable learning for managers in each region.

Over the course of the next five months, the Canadian Centre for Management Development undertook to consult with the community at large on the programming of such an event and to seek the support of the Clerk of the Privy Council and the Deputy Minister community. The Leadership Network further developed a managers' community website, set up a virtual network for managers and made plans to webcast parts of the Forum live via the Internet. The final plan of action was reviewed and accepted by community representatives and their ADM Advisory Committee in November, 2000. The wheels then went into high gear and the event was officially announced by the honorary co-chairs, Mike Nurse and Jocelyne Bourgon, President of CCMD, at a meeting of managers held in Hull on January 20, 2001. The three-day program featured keynote addresses and armchair discussions on current issues, 23 interactive workshops, community building activity, live webcasting, networking lunches with senior public servants and young professionals, information kiosks and an evening program.

Immediately after the announcement, a website was launched for the event and copies of the program were distributed across the country. Because time available for learning is the most important obstacle to participation, a particular focus of the marketing effort was directed to executives. The message was clear: “Give your managers the gift of time – encourage their participation in the Forum”. Soon, a tidal wave of registrants hit CCMD.

But much more important than the preparations, the real story behind the organization of this learning forum was to witness how it contributed to forging a team among the representatives of the different manager networks from across the country. With each passing week, the group became stronger and more engaged. It became determined to ensure the success of the Forum by using learning as the catalyst for building a national community. Leadership emerged from every corner of the country and by the time the Forum came, things were as they should be: supported by a strong council of their peers, by the Canadian Centre for Management Development and The Leadership Network and by the executive cadre, over 500 managers from every province and territory, from every department and from every functional community learned together, shared their experience and laughed together. The event went off without any significant hitch. By the end, the community not only had a body, it had a soul. Participants all joined in singing the theme song composed especially for the Forum.

## **The Journey Continues**

Plans for regional events and for the next national forum are already underway (in addition to the National Managers’ Council, 83 new people have officially volunteered to be part of the organizing committee).

The moral of this story is that learning and community building are a powerful combination, one which can eventually move mountains. As the Public Service of Canada enters the next phase of renewal, it can count on the active participation of a strong and vibrant managers’ community.

## 7. ORGANIZATIONAL READINESS OFFICE (ORO)

### The Challenge

The Government-on-Line initiative requires public servants at all levels to further develop readiness and capacity to make maximum use of new technologies in order to provide better and more effective service to the public.

In the past two years, the attention of the Chief Information Officer's Organizational Readiness Office (within the Treasury Board Secretariat) was focussed on building capacity within the IT community to address concerns about high turnover and a shortage of senior and executive talent. In working with our partners the Organizational Readiness Office (ORO) developed programs to attract and retain IT professionals in a tight labour market, develop IT executives and managers, and recruit new talent to the Public Service.

### The Players

This initiative was a collaborative effort. ORO, working with IT Community leaders, identified gaps and skill sets that needed to be addressed. IT leaders (Chief Information Officers and the Assistant Deputy Ministers within the federal government) provided direction and ongoing input. Private sector partners offered provincially-recognized training programs tailored to the Public Service needs that had been identified by IT Community leaders. Finally, several public sector partners were instrumental to achieving progress, including:

1. Various functional and boundary-spanning committees were included in decision-making and brainstorming activities;
2. Governmental partners – such as the Public Service Commission, Training and Development Canada, and the Canadian Centre for Management Development – were instrumental in implementing training and development services. They also staged learning events and conducted strategic research.
3. External partners, such as The Institute for Government Information Professionals, provided quality university-based education and professional development solutions to public sector information and technology professionals.

### The Tools

Four broad sets of tools were used: developmental programs, learning plans and training, recruitment, and competency profiling.

Participants were provided opportunities to take on challenging new assignments through the use of developmental programs. The resulting contacts in a variety of organizations helped them develop a clearer vision of their own ability to contribute to the development of IM/IT in support of the federal government's priorities and directions. Individuals who completed these programs are prepared to compete for Chief Information Officer positions in government departments and agencies.

Participants in the development programs were each given a personalized learning plan. The plans consisted of a combination of assignments, projects, and training and education. Each plan reflected individual needs based on work experience, career aspirations and assessment results. Assignments varied from six to twelve months.

One innovative approach to recruiting was the CS Bridging Program which provided training for administrative staff so that they could qualify to compete for entry-level positions. The CS Bridging Program uses Web-based training developed by the Collège Communautaire du Nouveau-Brunswick – Bathurst campus.

Competency Profile Models will allow individual learning programs and professional and career development programs to be tailored to help individuals develop the specific competencies needed in their work. A job skill profile template, a competency glossary and 25 job skill profiles were developed and are ready for the CS community to use.

## **The Journey**

Commitment at all levels to an ongoing process of change is critical to the success of transformation initiatives. To reinforce the message that ORO is working in partnership with the community, champions from within the community were identified for each initiative. These Champions were instrumental in engaging other Public Service leaders and in providing direction on requirements for each initiative.

One of the initiatives is a competency-based executive development program devoted to IM/IT. It is designed to cultivate IM/IT leaders by using developmental assignments to promote retention.

Managers in the communities of information management and in delivering services to citizens are engaged in identifying the business processes impacted by technological changes and the real and potential impact of these changes on the workforce. One of the leadership challenges is to provide vision and engage the employees by effectively communicating the “why” as well as the “what” of organizational change. The programs and experience developed to date with the IT community are readily adaptable to meet similar needs in the IM and Service communities. Within ORO itself, the emphasis is shifting from the original IT community-renewal mandate to readying the IT, IM and Service communities to manage and implement necessary organizational change.

## **The Journey Continues**

The change process involves a continual re-skilling of people and a re-tooling of management practices to make best use of current and developing technologies. The Organizational Readiness Office is preparing to help managers and workers in these communities meet changing demands with tools such as: the Competency Profile model; a Web-based mentoring tool; and, the Management Development Program.

In partnership with the IT, IM and Service communities, ORO will continue to address needs for additional developmental and retention programs, including programs to allow the government to continue to benefit from the skills of employees who are ready to retire.

## 8. IMPLEMENTING FOREIGN POLICY: SHORTENING THE LEARNING CURVE AT DFAIT

### The Challenge

As with numerous other Public Service objectives, the implementation of Canada's foreign policy requires specialized skills and knowledge. In the past this was acquired through learning by the accumulation of experience over time. Today, this is no longer affordable – learning has had to be speeded up.

### The Learning Trailblazers

To meet this requirement, the Department of Foreign Affairs & International Trade's (DFAIT) learning arm – the Canadian Foreign Service Institute – has been developing a comprehensive foreign policy curriculum which is expanding the use of new learning approaches and new technologies.

The driving force behind the curriculum is DFAIT's annual recruitment of new foreign service officers. The changing demographics of DFAIT and the expanding international agenda, however, mean that numerous other professional groups are also active in delivering Canadian foreign policy - from international security to international trade. The Institute's curriculum is therefore open to all officers in the Department, officers in other Departments and in provincial governments.

### The Learning Tools

The curriculum distinguishes between two broad categories of learning interventions: core foreign policy skills and foreign policy applied knowledge.

On the "skills" side, courses focus on core competencies: such as negotiating in bilateral and multilateral fora, advocating and defending Canadian interests, communicating in international environments and dealing with the media. On the "applied knowledge" side, courses are delivered within a framework that begins with an examination of broad socio-economic trends, in both Canada and the world, that impact on Canadian foreign policy. To sharpen this broad knowledge, specific courses are given in areas such as: international security, international law, economic diplomacy, conflict prevention, trade policy and trade promotion, Canada-US relations and multilateralism.

The curriculum is delivered in a modular way. Most courses are two or three days long. They are held at regular and set times throughout the year. Foreign service recruits must acquire a minimum number of "learning credits" prior to being assigned abroad for the first time. In 2000-2001, CFSI staged 25 different courses and, nearly 65 deliveries of those courses.

The foreign policy curriculum is open ended. It has links to other learning programs in DFAIT, such as "The New Approach", which is aimed at developing a highly-trained, multi-skilled cadre of trade commissioners. It can also be linked to many other learning opportunities now being developed throughout the Public Service. The philosophy of the curriculum is anchored firmly in the emphasis placed by COSO on "Recruitment, Retention and Learning".

## **The Learning Journey**

The curriculum's challenge is to be at the forefront of learning innovation. Although many of the learning resources are experts drawn from the Public Service and universities, increasingly, well-known speakers from outside are brought in to share their experience. For example, General Romeo Dallaire using his insight on the human security aspects of the recent Rwanda crisis speaks to a course on "conflict prevention". This is a good example of the concept "lessons learned" being put into practice.

Technology plays an increasingly more important role. Video conferencing is used to bring experts from outside Ottawa into classroom courses. Additionally, DFAIT's Virtual Campus, which delivers more than 40 different kinds of courses to DFAIT employees at more than 160 locations around the world, can also be used to prepare participants prior to entering the classroom or for follow-up after the sessions.

The Institute has a comprehensive evaluation approach (instruments are used to do evaluation at four levels) which supports all learning programs and leads to continuous improvement. The work of the LDC informs the DFAIT foreign policy curriculum. The "Continuous Learning Policy" for the Public Service will create a clear framework for it.

## **The Journey Continues**

The curriculum faces the same ongoing challenges as all learning events: keeping courses up to date; staging them so as to ensure maximum participation; ensuring practical learning takes place; developing tools that convincingly show that the implementation of Canada's foreign policy improves as a result of learning (i.e. refining the "business case").

Foreign policy learning is a journey without end, but more and more public servants find it is its own reward and brings strong dividends.

## 9. SASKATCHEWAN COUNCIL OF SENIOR FEDERAL OFFICIALS' LEARNING RESOURCE CENTRE

### The Challenge

The Learning Resource Centre, originally called the Career Centre, was first conceived in the Spring of 1994. It was the vision of the Saskatchewan Council of Senior Federal Officials to provide career advice and support to federal employees affected by Program Review. The Council wanted to consolidate developmental materials and career counselling resources into a single entity which would be more efficient and avoid duplication. The strategy was intended to benefit employees from all departments by enhancing access to those materials.

Following the successful establishment of the Regina Career Centre, a group of several managers and union representatives opened a Saskatoon-based office to more directly serve staff in the northern half of the province. From these early beginnings, support for the Centre has grown and expanded. Thousands of employees have either passed through the doors of the Centre, been visited by Centre staff or have otherwise used the resources and services of the Centre.

### The Learning Tools

Services offered by the Centre have evolved with the changing needs of the public servants located in the region. From its original offerings of career counselling and support to employees whose positions had been eliminated, the Learning Resource Centre has now placed lifelong learning at the hub of its activities.

The Learning Resource Centre offers an extensive collection of over 5,000 books, documents, videos, compact disks and audiotapes to federal employees based in Saskatchewan. The collection's market value is estimated between \$750,000 and \$1,000,000. New technology has been introduced to automate the entire collection data base and make it available to anyone, anytime, anywhere. All library material from the former North (Saskatoon) and South Centres have since been consolidated into a single location in Regina. The collection contains highly diversified material on human resources, organizational behaviour and on professional and personal development. One can search for items by title, author, keyword or standardized subject headings.

Staff of the Learning Resources Centre estimate that a significant share of the Region's 8,000 federal employees benefit from the Centre's service. The Centre's reach is expected to grow exponentially with the launch of the new online ordering system.

Continuously adapting to the imperatives of the Public Service in the knowledge society, the Centre now offers an online searching and ordering capacity to its target audience. Employees can now directly order materials online, based on their needs, with a click of a button. In addition to preparing the order and arranging for pick up or delivery of the material, the staff of the Learning Resource Centre can also offer librarian research assistance to their clients. Federal employees can also consult on-site the Centre's information holdings.



## The Learning Journey

Since its inception, the Learning Resource Centre has remained responsive to the needs of clients. It has done so by systematically seeking feedback from clients, by encouraging an ongoing dialogue with users and the people that represent them on the Saskatchewan Council, and by maintaining a commitment to continuous improvement. It has adapted its core line of business from providing specific career counselling assistance to employees whose position had been cut back as a result of Program Review to offering an integrated learning resource centre accessible to all federal employees engaged in continuous learning.

The key lesson learned, based on its six years of experience, is that the success and relevance of such a service is predicated on a client-centred approach and on appropriate technologies that enhance the reach, quality and efficiency in service. The Centre has also benefited from an effective governance structure which allows for responsive decision making and strategic deployment of resources. Through the Human Resource sub-committee of the Council which provides strategic direction, and with the support of partners from the Unions, the Human Resource community and the Joint Career Transition Committee, the Executive Director of the Council and the Learning Resource Centre team managed a successful transition to become an organization that provides value-added learning services to a highly geographically dispersed constituency.

## The Journey Continues

There are several key challenges that the Centre will be addressing in the years ahead. It will be important to keep the collection current and make the investments needed so that the best information resources are available for clients. The Centre is currently exploring how to strengthen its relationship with public and governmental libraries to ensure a more expedient process for interlibrary loans. The cost of maintaining data base subscriptions will also be examined to optimise return on investment. Partnership is another area that will be examined. The highly successful partnership with the Saskatchewan Liquor and Gaming Authority which allows provincial employees to access library resources will likely be emulated with other partners.

The Centre will need to consolidate its resource base to ensure greater predictability in business planning and operation. As with many other horizontal initiatives, the Centre is confronted with the need to create a supporting structure and secure adequate funding to maintain the momentum. In addition, the role of the Joint Career Transition Committee as they work with the Council is expected to be invaluable in mustering support and commitment for the Centre, as it has in the past. The Centre also wishes to strengthen its capacity to anticipate and respond to emerging issues. The Centre's mandate and operations are consistent with the spirit of many recommendations formulated by the Deputy Minister's Learning and Development Committee on encouraging learning and integrating learning in management practices. In many ways, the Learning Resource Centre is a pace-setting initiative.

## 10. ECONOMIC DEVELOPMENT CANADA'S INTEGRATED HUMAN RESOURCE MANAGEMENT APPROACH

### The Challenge

The document on Economic Development Canada (EDC)'s integrated approach to human resource management originated out of the desire to help the agency's managers and employees grasp the gist of the three national sub-committee reports on recruitment, retention and learning.

Certainly, one aim of this exercise has been to create a coherent, integrated vision of the situation and the challenges it represents for the whole federal public service. However, even more importantly, the objective has also been to disseminate a condensed version of the three reports, which would both highlight what EDC has already accomplished in meeting the challenge of a modern public service that truly serves Canadians, and identify possible lines of action that would enable the agency to make intelligent choices concerning its priorities in human resource investments in the years to come.

### The Learning Approach

EDC's Human Resources Branch therefore produced a document of approximately twenty pages that summarized and correlated the three reports. This document also outlined the current situation at EDC in terms of the action already initiated in each of the three areas, the outstanding issues, and a list of agency-specific solutions for implementing the conclusions of each report.

DEC's management committee (OMC) then discussed these proposals before deciding on several that are currently being developed or implemented. These action priorities revolve around two core concepts – the learning organization and skill-based human resource management.

The concept of the learning organization is truly the crucible in which the various efforts to consolidate organizational practices, introduce new ones, or change them internally or externally are merged.

An organization that promotes and values learning, information-sharing, innovation, preserving and enriching collective knowledge, and the synergy of ideas, and which takes maximum advantage of new technology and cutting-edge socio-economic trends is an organization that is bound to become an employer of choice. Such an organization is able to attract new employees and keep its existing ones by providing a stimulating workplace that satisfies the basic developmental ambitions of its work teams.

EDC cannot avoid applying to itself the management principles that it promotes for the companies that it works with; that is why a strategy to help the agency become a learning organization is currently being developed.

## The Participants

A task force, made up of representatives of the whole organization, was given the mandate to develop and propose a strategy and action plan to make EDC a learning organization, especially through the use of knowledge-management, knowledge-dissemination and information-sharing principles and practices that reflect the agency's mission and needs.

Both male and female staff can learn together how to develop approaches to achieve this goal. One of these approaches is skill-based human resource management – an approach that, in fact, plays a pivotal role in the whole process.

Managing human resources on the basis of their skills – in other words, on the basis of their overall knowledge sets, including their know-how, their self-management skills and their ability to develop – opens up exciting perspectives in areas such as recruiting, job mobility, development, team work and the use of new technology.

This approach is capable of exerting impact on a wide range of functions – from performance management to work organization – in a way that provides a sense of the flexibility of an active organization which is in tune with the knowledge age and in which employees are able to develop and express their full potential to the enormous benefit of the Canadian people as a whole.

While there are several key prerequisites to continuing this process in terms of EDC's organizational culture and work practices, the agency has to place even more emphasis on valuing diversity, promoting teamwork, cultivating the ability to be open to differences and sharing in ways that facilitate integration and innovation, and effectively combining differences and complementarity.

## The Transformation Continues

While the summary document prepared by the EDC's Human Resources Branch represents a start, a lot still remains to be done to make EDC a learning organization that fully reflects what the agency wants to achieve along these lines as an organization that is even more open to diversity and which uses skill-based HR management.

Nevertheless, a number of steps have already been taken in this direction – the selection criteria for entry-level positions are gradually being changed, the preparation of new competency profiles is already well advanced, diversity awareness activities are ongoing, a management development committee is going to be set up, mediation workshops are planned, the intention to identify future managers from among the support staff has been announced, the "coaching" program is now in its second phase, and the revised version of departmental policy on lifelong learning is now at the consultation stage.

All these developments show that, while much still remains to be done, EDC is definitely "on the right track!"

## 11. JUSTICE CANADA'S LEARNS SKILLS FROM ITS OWN MASTERS

### The Challenge Faced

The Department of Justice (DOJ) determined that some of its lawyers, especially new recruits, needed to improve their “*advocacy skills*”. Advocacy, or the practice of oral presentation before Courts, requires a great deal of professional skills and knowledge. It is a learned activity which can be taught and improved-on through proper training. Over the last few years, DOJ was recruiting at a furious pace to address several urgent litigation issues such as the thousands of cases dealing with issues of abuse at Indian Residential Schools. It could not be certain of the where all the ‘new hires’ were on the development curve. The lawyers also recognized the need to develop their skills further and PREAs resounded with requests for “advocacy training”. Advocacy skills training is not generally available across the country from law schools or law societies.

The Advocacy Program was therefore created to satisfy the ‘need’ of the Department to determine or improve the quality of its lawyers and to satisfy the will and motivation of the lawyers to be more effective. And it had to be done fast.

### The Players - The People

The whole Continuing Legal Education “CLE” Division in DOJ was mandated to develop and ensure the success of the program. The success of this program would not have been feasible without the mobilization and contribution of an entire team of highly qualified professionals. Leadership was provided by its Director, Louis-Charles Sirois. Financial and strategical insight was supplied by Ann Rouette and Operations and Curriculum Design by Chris Burke. The players and the team had to find a way to deliver specialized and unique, professional training, across the country while simultaneously find a way to fund it – all in an extraordinarily short time. All depended on convincing key senior lawyers to become voluntary skills trainers, and to do so repeatedly. The challenge was to deliver a resource intensive type of programming which had never been tried in Government before and for which there were no guidelines. It had to establish curriculum priorities, find new design and delivery models. To do so, it had to be nimble. Without the highest degrees of cooperation and trust (there were essentially no resources allotted to redundancy systems to check for mishaps) the program would have failed.

### The Tools

The curriculum for each workshop across the country was customized to the litigator groups’ particular needs. The “*fact situations*” which the participants would use to “*cross-examine*” “*witnesses*” were designed from actual cases, so if a tax or criminal or immigration program was needed, it could be delivered. Nothing was generic. This, combined with specially trained instructors, made for a very effective training model.

It was a priority to lever the “intellectual stores” of DOJ so it was decided that its own counsel would be trained. Suitable instructors were identified by senior management and about 100 lawyers-turned-instructors were trained in Toronto, Vancouver and Montreal. The talent pool was now in place.

The innovative tools took two forms – Program Delivery and Teacher Training and Curriculum Design. Delivery was reasonably easy to solve. Traditionally, binders would be shipped to participants or handed out at the seminar if there was a program in Edmonton. Simple, but look at the system/resources involved. Who would check the materials? How much was the photocopying/binding? How much time to ship? How many days before the event were they shipped? What happens if the material is lost?

Too little control, high risk. So it was decided everything would be electronic and all of the materials would be sent to the desktop via email. Its in Edmonton in seconds at no cost.

## The Journey

Several specific legal skills training programs have now been delivered using this successful approach. One of the many programs so designed is “Written Advocacy” which also featured a Court of Appeal Judge, a practicing Crown Attorney from a Provincial Prosecutions Group and an English Professor from the University of Alabama.

Some Provincial Law Society CLE administrators have qualified this program as the best program of its kind in North America. The evaluations were absolutely superb in all the cities – Toronto, Ottawa, Winnipeg, Saskatoon, Edmonton, and Vancouver – have requested the program’s return. Various comments of what people thought, such as the following, from a participant from Winnipeg, came sometime after the program on “Written Advocacy” and were considered as a reliable measure of quality. He emailed:

“Allow me to emphasize that this course was outstanding, a quantum leap for all of us who took part. In addition to using these methods in the workplace, I recently used the techniques to help draft a plain language by-law for a non-profit organization I work with; the non-lawyer directors were delighted. My thanks again.”

## The Journey Continues

This skills program now consistently delivers workshops across the country, and is a “*permanent*” learning initiative.

Imitation is the sincerest form of flattery. Legal organizations across the country are envious with what DOJ built from scratch and see no reason to commit the resources to duplicate it. DOJ has also met several times with the Attorneys General of Ontario, of British Columbia and of California to discuss the duplication of this Program in their own organizations.

Having *senior “masters”* consistently teach skills to junior is certainly effective continuity planning.

## 12. CAREER ADVISORY PANEL FOR SENIOR PROFESSIONALS

SITT Sector of Industry Canada

*"It is the task of every generation to build a road for the next generation."*

John F. Kennedy

### **The Challenge** *Help them grow or they may go*

One defining characteristic of a learning organization is a commitment to the development of its people - quite apart from its readiness to embrace new concepts. This synopsis describes how one organization believes it is learning to build human resource programs that are both innovative and practical.

Like most organizations we are convinced that our senior professionals (essentially experienced commerce officers, economists, engineers and informatics specialists) are absolutely crucial to our ability to excel - both now, and in the future. Various employee surveys, internal reviews and focus group discussions have confirmed that members of this community consider the lack of management support for career planning and development to be a leading concern. More precisely, our senior professionals are looking to managers for assistance in developing their longer-term career plans. The ultimate challenge then, became one of building a support program that would exceed all expectations. Such a program would provide us with a distinct competitive advantage vis-a-vis our ability to attract, develop and retain this segment of highly talented, valued and mobile employees.

### **The Learning Trailblazers** *Selecting a champion*

The original need for a new approach to career planning and development emanated from a broad-based Sector renewal initiative which was well underway. The executive team turned to its renewal champion to devise a way of addressing the above challenge. In the end, all of the Sector's executives would be actively involved in the resulting program.

### **The Learning Techniques** *Group mentorship*

We began by researching the issue and reviewing best practices. This led us to conclude that our senior professionals were looking for broader, longer-term career development advice than they would normally receive from their immediate supervisor, where the focus tends to be on near-term/traditional development more directly related to the individual's existing position. In addition, the clear desire for 'highly relevant' advice led us to reject professional career counsellors who lack an awareness of our environment and the range of development opportunities and programs that exist within our Department/Sector.

The approach selected could best be described as a form of “*group mentorship*”. Our Career Advisory Panel initiative was offered to *Senior Professionals* on a voluntary basis and consisted of three distinct stages:

- A preparatory stage during which participating senior professionals were given access to information on career opportunities, self-assessment tools and external diagnostic services. The intent was to have the participants assess their capabilities as well as their interests and to define as clearly as possible their longer-term career aspirations and related learning/development needs.
- The second stage was unquestionably the most innovative. It consisted of structured sessions of up to one hour in which each participant met privately with an advisory panel of a half-dozen executives representing all areas of our organization. These sessions, which were driven by the participants, were confidential, informal and non-judgmental. Participants presented their past achievements, current situations and aspirations and posed a few pivotal questions pertaining to their career plans. The panel’s role was to provide advice, ideas, information and contacts to help the senior professionals clarify their longer-term career strategies.
- In the third and final stage, participants were encouraged to begin to initiate appropriate courses of action. One aspect of this involved their meeting with their direct supervisor to agree on more immediate and concrete development activities for the upcoming year.

### **The Learning Journey** *A resounding success*

An independent evaluation following the pilot indicated that more than three-quarters of the 54 participating senior professionals considered the initiative to be a resounding success. All expressed a determination to act on the results of their session and 9 out of 10 indicated that they would recommend the program to a colleague. Somewhat more surprising was the extent to which executives were energized by their experience as panel members. Without exception, all 25 executives viewed the sessions as a positive bonding experience as well as an exceptional opportunity to help develop future talent.

### **The Journey Continues** *Improving and sharing*

What was once a pilot project has now become an annual program available to all new senior professionals with biannual follow-up sessions offered to past participants. Improvements continue to be made to the program and an attempt is now being made to adapt the concept for application to employees below the senior professional level.

In many respects this initiative stems from the culture which has been set by our ADM. It reflects the Sector’s commitment to people development, a willingness to experiment with non-traditional approaches and a desire to share our experiences with other organizations. We are pleased to have had this opportunity to describe what we believe to be an innovative yet practical contribution to the learning and development challenge confronting us all.